I-SMART Data Reporting for Assessment-Only Agencies

A brief outline of the I-SMART data entry process for a client who received a Placement Screening (Assessment) is below.

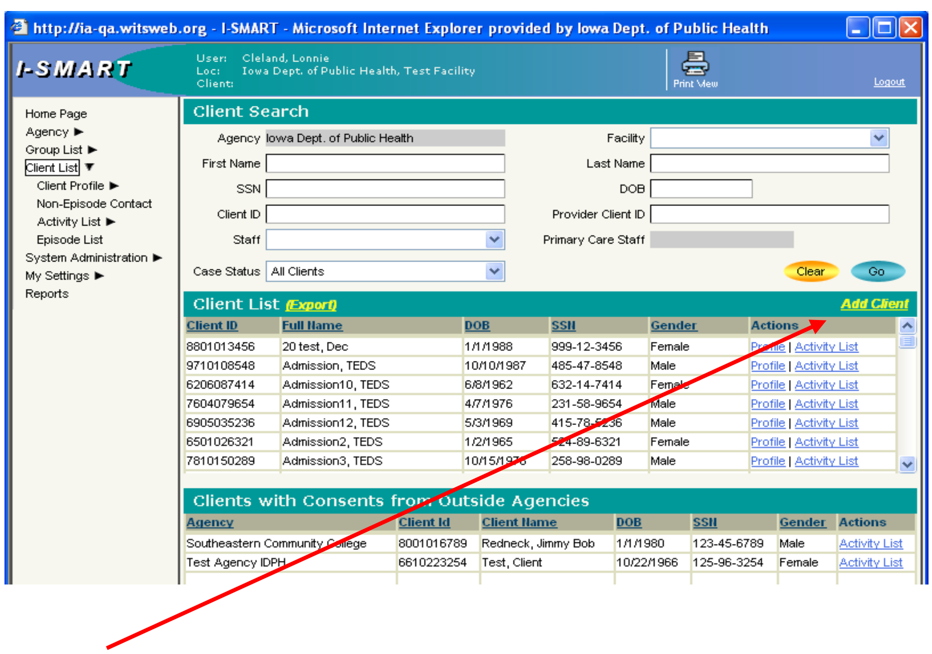
Client Profile
Intake
Crisis and Placement Screening
Program Enrollment: Assessment Program
Encounter Note
Program Enrollment: Unenroll from Assessment Program
Intake: <u>Save and Close Case</u>

The above constitutes a complete Case or Episode of Care if the client is not being admitted for treatment. Closing the Case at the Intake screen will close the Episode.

In order to complete the state-required fields in I-SMART, complete the required fields (Dark and Soft Yellow only) in each of the following modules and screens.

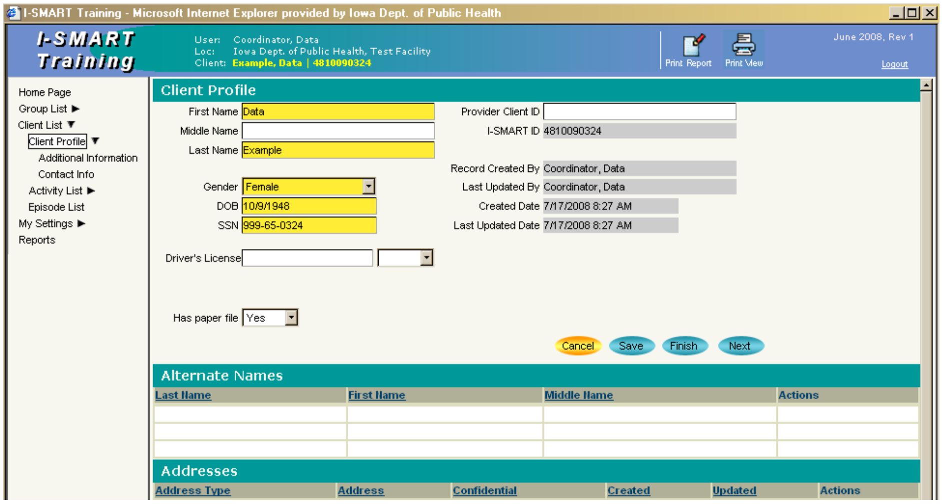
Placement Screening/OWI Assessment

- **Client List**: If client already exists in database as a Closed Case, choose client's **<u>Activity List</u>** hyperlink under **Actions** and ***<u>Start New Episode</u>***. Or, if client does not already exist in the database, ***<u>Add Client</u>***.



- ***<u>Add Client</u>*** will take you to the **Client Profile** screen.

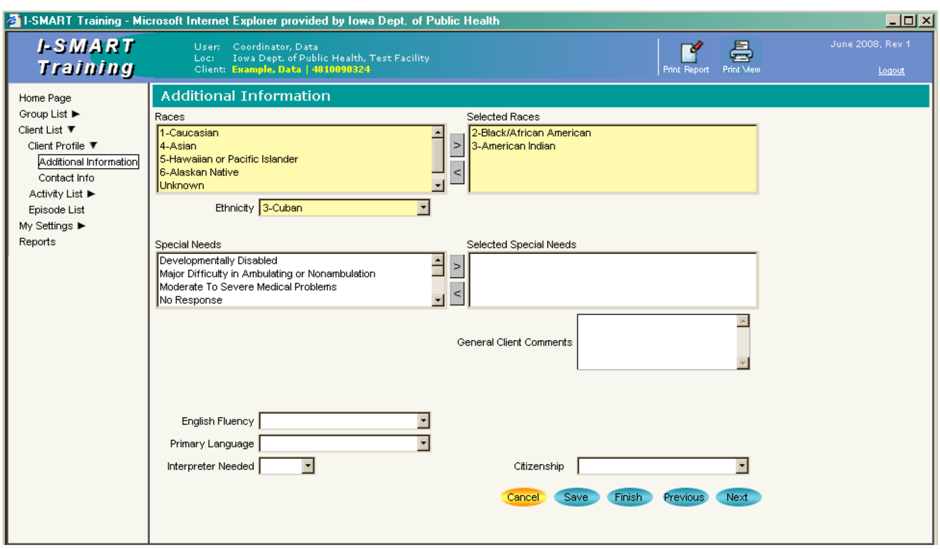
- **Client Profile**



✓ **Social Security #:** If the client has no SS# or if it is unknown, the user can create a number by using the format 999-00-0001, 999-00-0002, etc., where the first three numbers are always 999. The agency will have to keep track of SS#'s it creates.

❖ **NEXT** button will take you to the **Additional Information** screen.

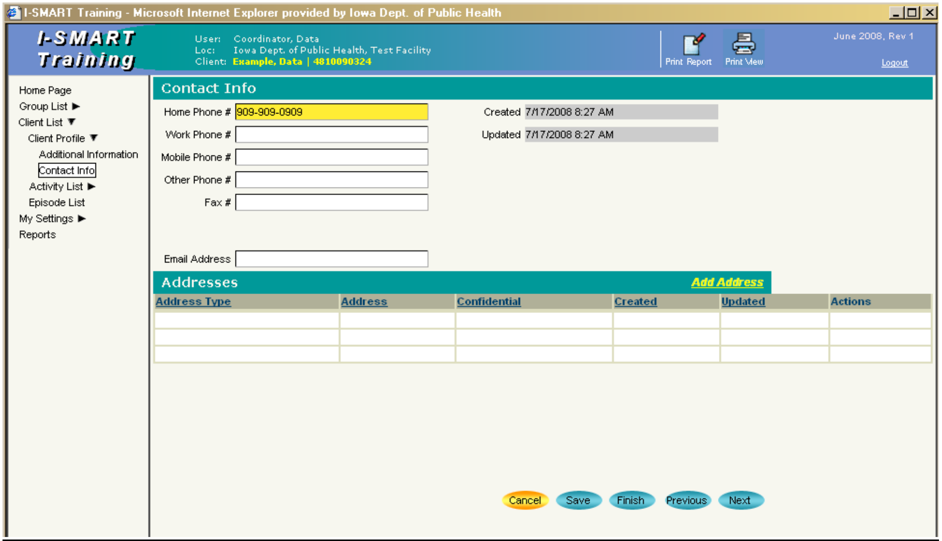
- **Additional Information**



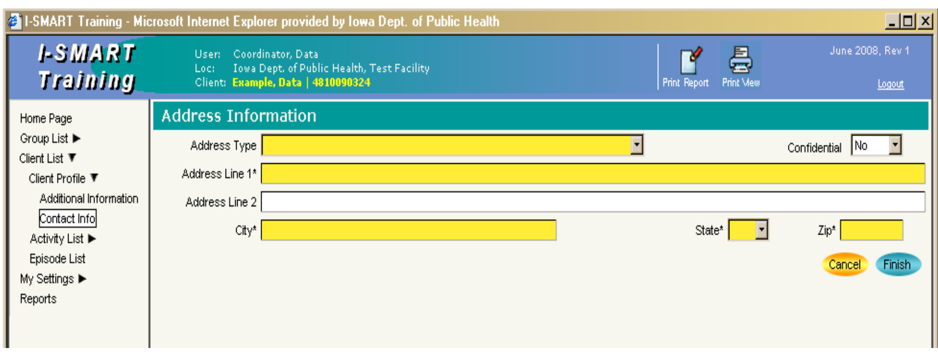
❖ **Next** will take you to the **Contact Info** screen.

- **Contact Info**

  ✓ **Home Phone #:** If no phone, enter 0000000000 (10 zero's).



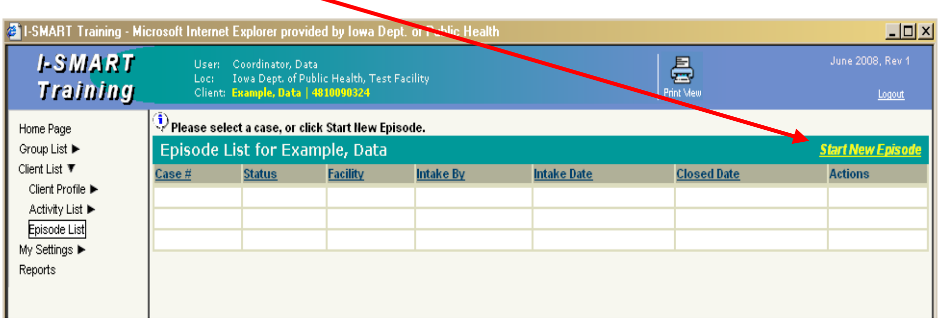
  ✓ ***Add Address*** will open the Address Information page. (See next page)



- Complete the **Address Information** screen and click **Finish**.

  ❖ **Finish** will take you back to the **Contact Info** screen.
  ❖ **Finish** on the Contact Info screen will take you to the **Client List** screen.

- **Activity List:** In the left, choose **Activity List** link. This will open the client's **Episode List** screen. If it does not, navigate to the Episode List screen using the left menu. Click ***Start New Episode***.



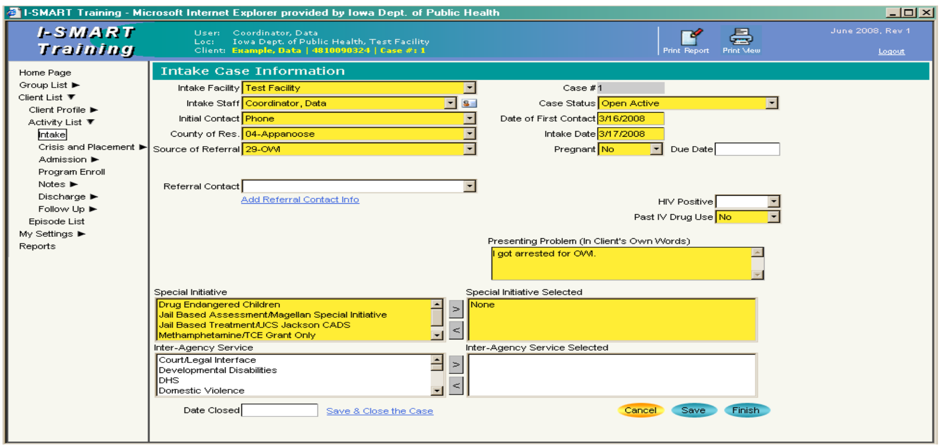
- ***Start New Episode*** will open the **Intake Case Information** screen.

  - ✓ **Initial Contact**: How did the client first contact the agency? Usually the response is by phone.

  - ✓ **Date of First Contact** will be the date of that phone call.

  - ✓ **Special Initiatives** are projects funded by either Magellan or IDPH. Most users should enter **None** in this box.

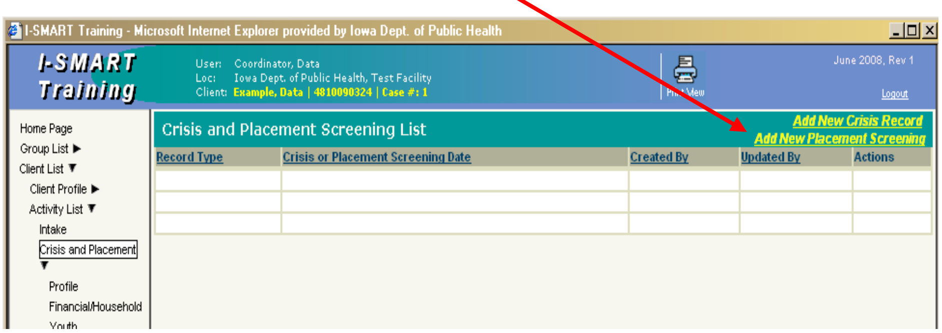
  - ✓ Complete the screen and Click **Finish**.

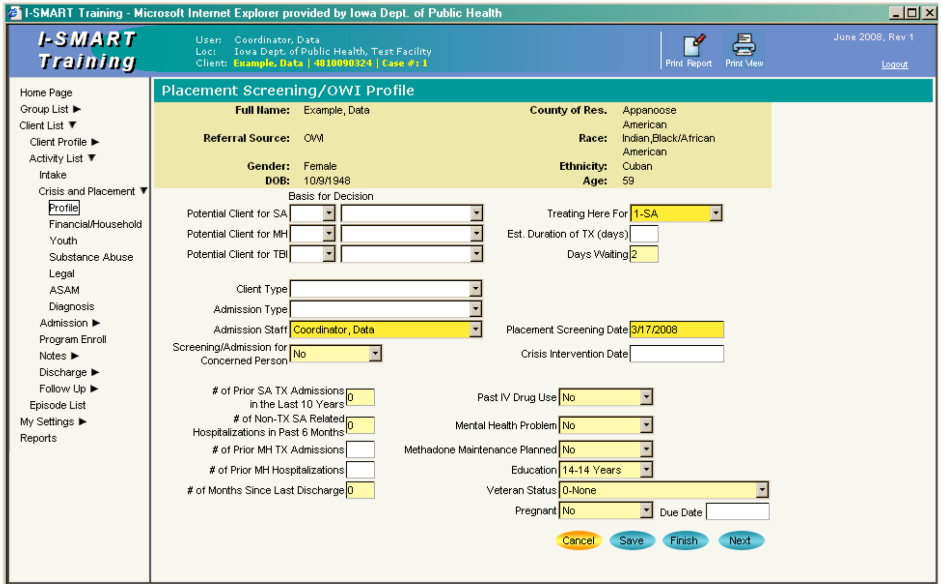


  - ❖ **Finish** will take you to the Client's **Activity List** screen. The **Activity List** screen shows the user what data elements s/he has completed in the client file.

- **Placement Screening:** At the left hand menu choose **Crisis and Placement**.

  - ✓ Choose ***Add New Placement Screening***. This will open the Placement Screening Profile screen.





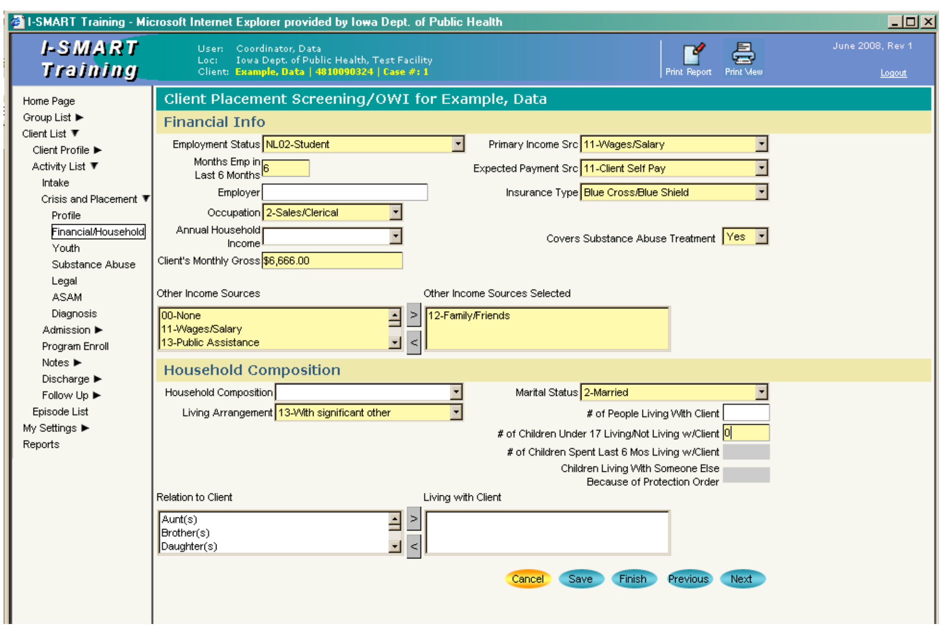
- **Days Waiting:** Difference between the **Date of First Contact** on the Intake screen and the **Placement Screening Date**.

- **Placement Screening Date:** Date the Assessment was completed.

- **Screening/Admission for Concerned Person** response is almost always **No**. Choose **Yes** <u>only</u> if you are screening a friend/family member of a substance abuse client.

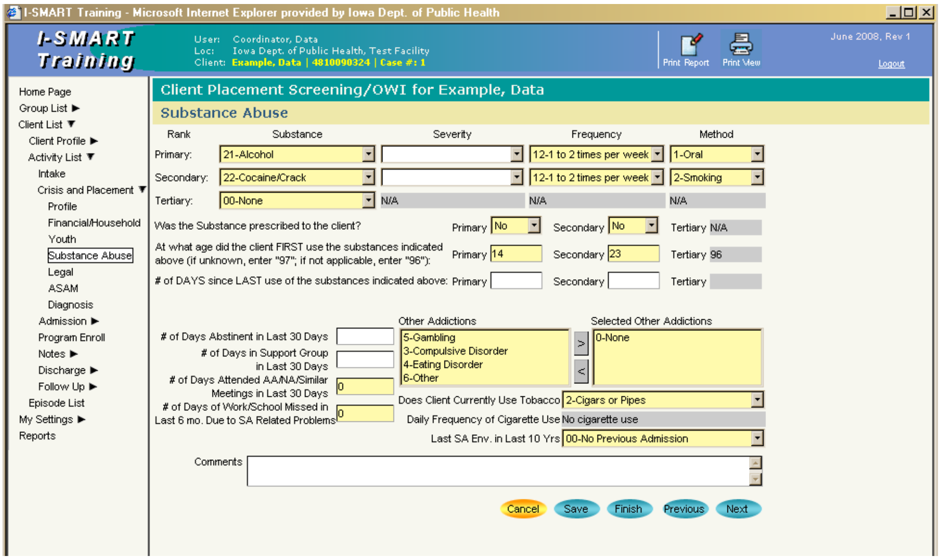
  ❖ **Next** will take you to the **Financial/Household** screen.

- **Financial/Household**



❖ **Next** takes the user to the **Substance Abuse** screen.

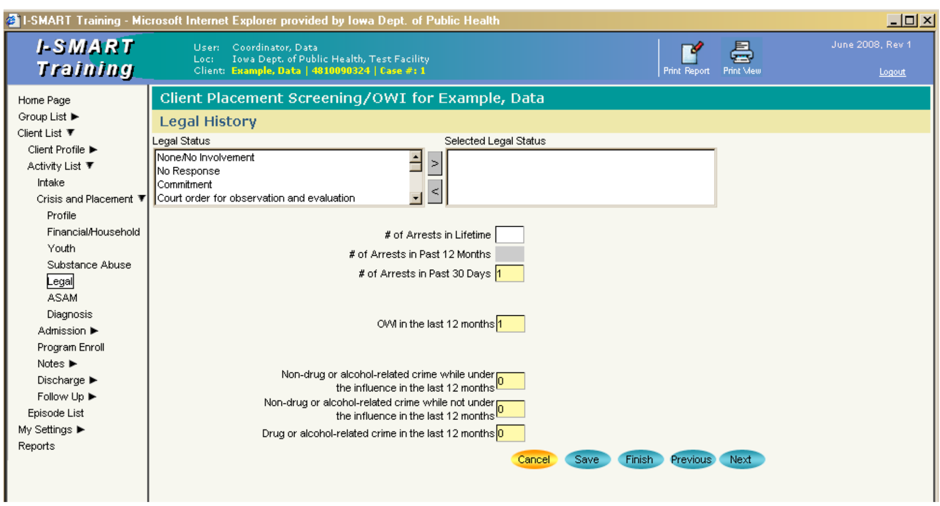
- **Substance Abuse**



✓ Note that the maximum number entered in the "# of Days Attended AA/NA/Similar Meeting in Last 30 Days" is 30.

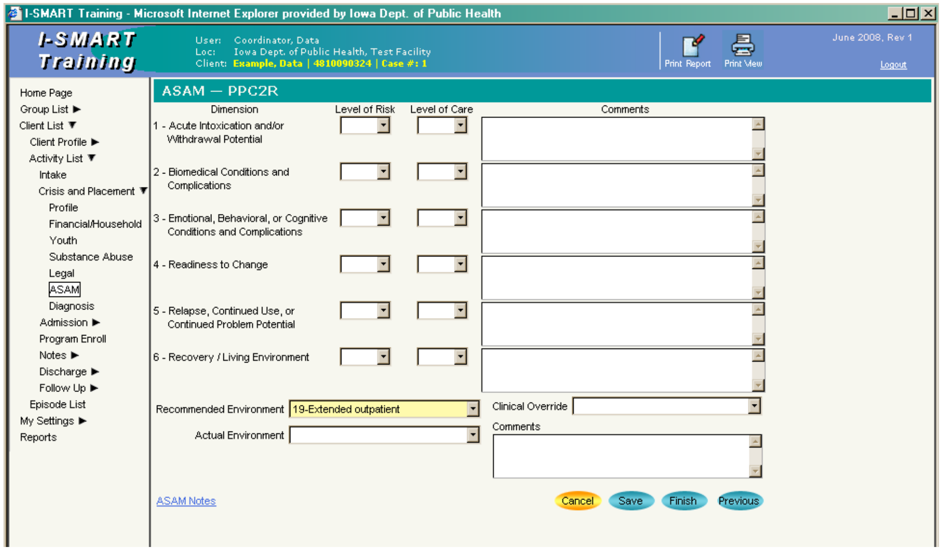
❖ **Next** will take the user to the **Legal History** screen.

- **Legal History**

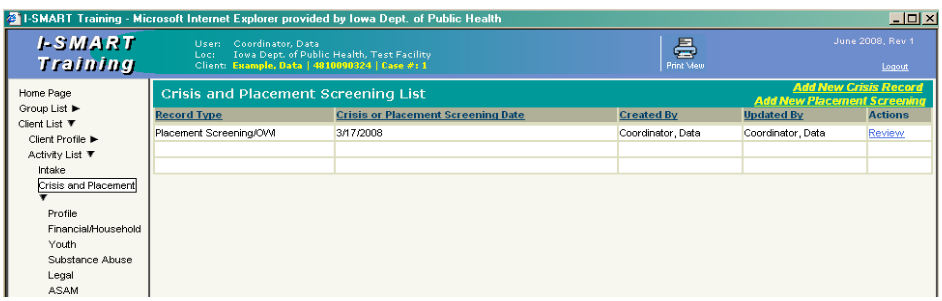


❖ **Next** takes the user to the **ASAM** screen.

- **ASAM**: When doing a **Placement Screening/OWI** only the **Recommended Environment** is required.

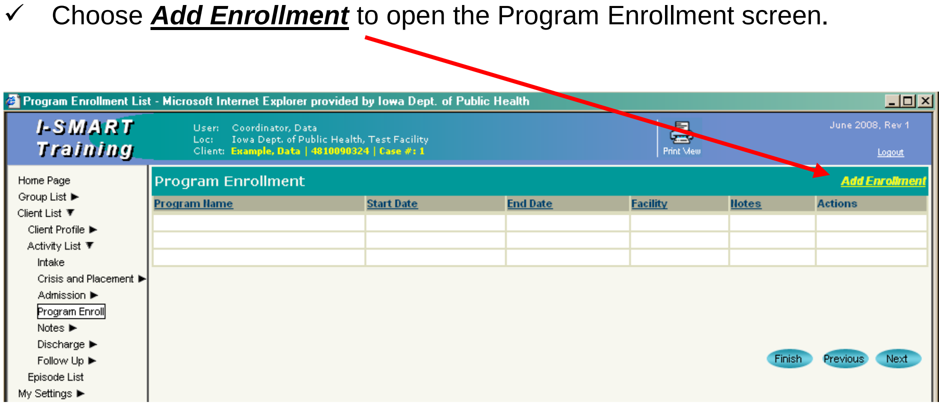


❖ **Finish** will take the user to the client's **Activity List** screen showing the current Placement Screening.

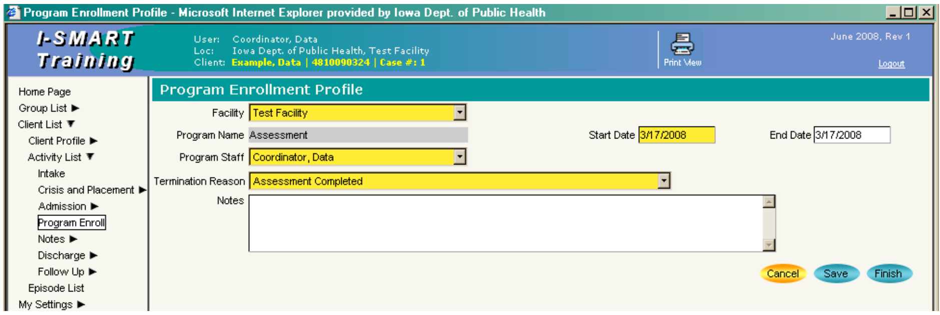


- **Program Enrollment:** User must enroll the client in a program to record the services delivered. **Program Enroll** in the left-hand menu will open the Program Enrollment list screen.

✓ Choose ***Add Enrollment*** to open the Program Enrollment screen.



✓ **<u>Add Enrollment</u>**: This will open the enrollment screen for editing.



✓ **Program Name:** Choose **Assessment** program.

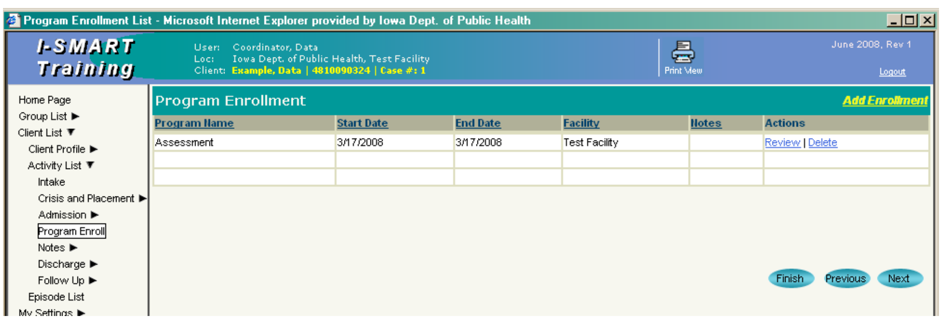
✓ **Program Staff:** The name chosen is up to the user.

✓ **Start Date:** Note the Start Date of the program enrollment will default to today's date. User must change it to the date of the assessment.

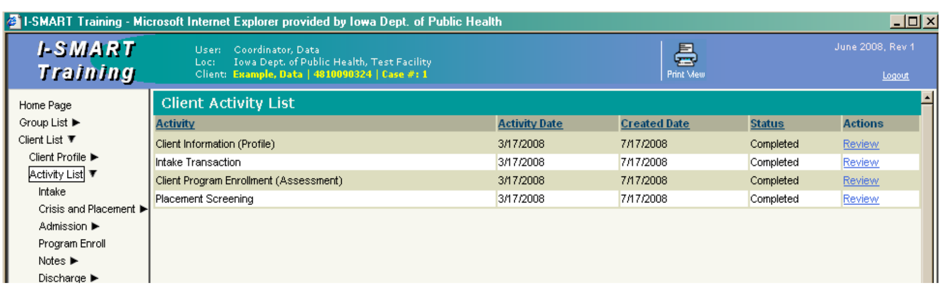
✓ **End Date:** The date the client was last seen during the assessment. Usually the same as Start Date.

✓ **Reason for Termination**: **Assessment Completed**.

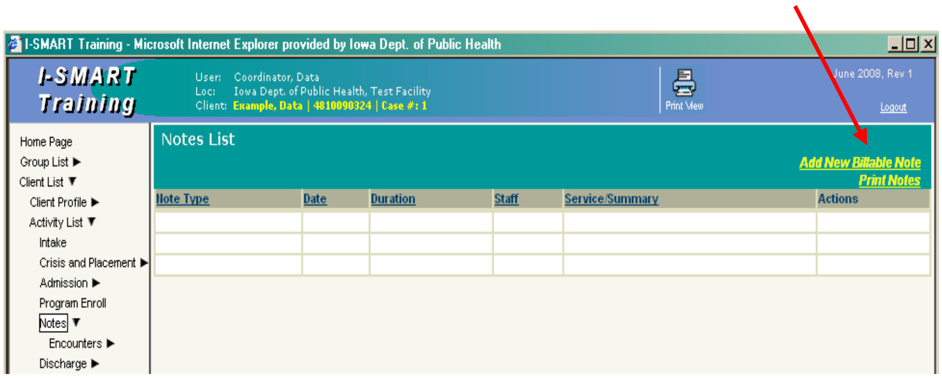
- ❖ **Finish** will close the screen and place the Program Name and other info on the **Program Enrollment List** as shown below.



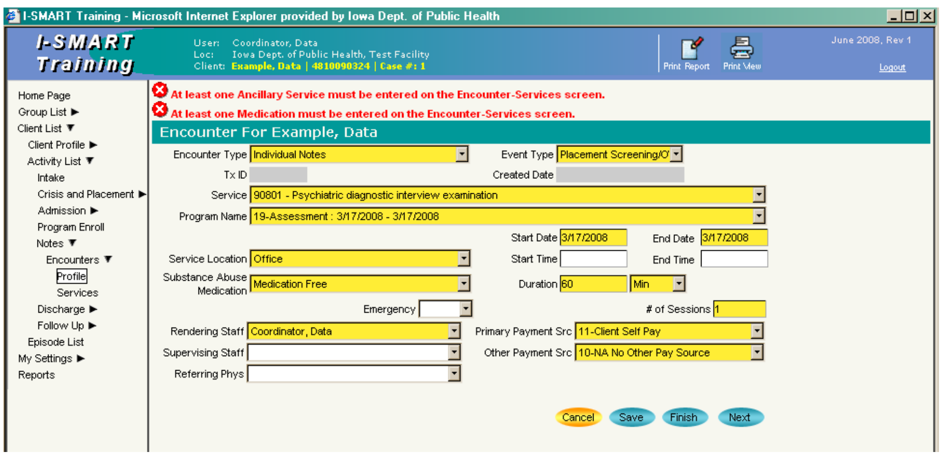
- ❖ **Finish**: This will take the user to the **Activity List** screen.



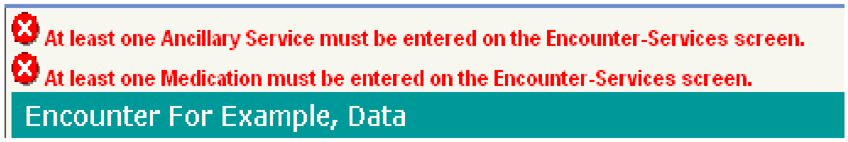
- **Notes**: From the left menu, choose **Notes**; then choose **Add New Billable Note**.



- **Encounter Profile**



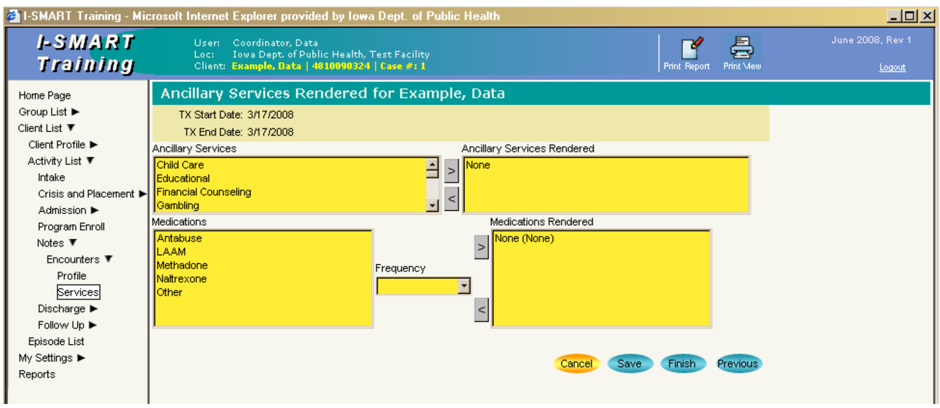
- ✓ **Encounter Type**: **Individual Note**
- ✓ **Event Type: Placement Screening/OWI**
- ✓ **Service: 90801**
- ✓ **Program Name: Assessment**
- ✓ **Service Location:** Defaults to location specified when the facility is set up. Most users prefer this to default to Office. Contact IDPH for this option.
- ✓ **Substance Abuse Medication**: usually **Medication Free** unless client is taking Methadone, Antabuse or some other drug prescribed to help inhibit drug use.
- ✓ **Start Date** and **End Date** are usually the same date.
- ✓ **Duration**: enter length of session in minutes
- ✓ **# of Sessions**: usually **1**
- ✓ **Primary Payment Src**: populated by the choice from **Admission** module.
- ✓ **Other Payment Src**: are any other sources providing payment for service?



The above alerts will appear if the user clicks Save. They are simply reminders to do the Ancillary Services screen next.

❖ **Next** will take the user to the **Ancillary Services** screen showing the current Placement Screening.

- **Ancillary Services**

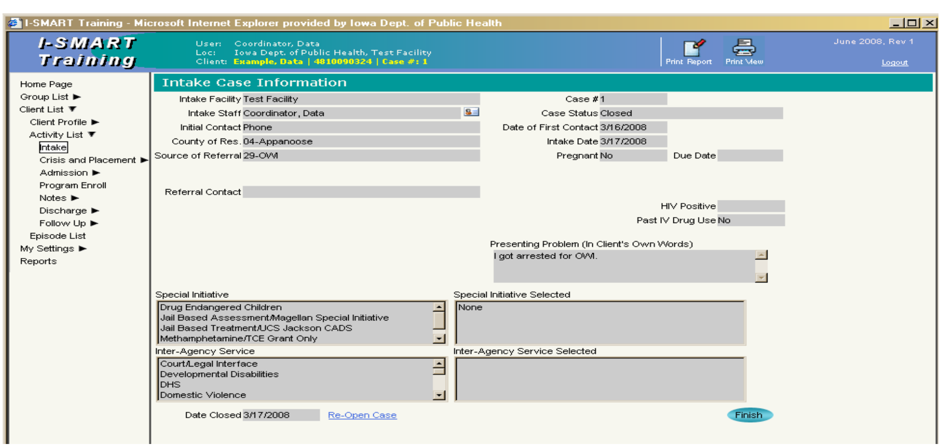


✓ **Ancillary Services**: These are services the client receives while in treatment. They may be provided by either the treatment provider or an outside agency.

✓ **Medications/Frequency**: These relate to the **Substance Abuse Medication** field on the **Encounter** screen. Choose the appropriate medication listed. Remember, this is a listing of only those medications a client might use to inhibit his/her substance use. Do not list anti-depressants, anti-anxiety agents or other psychotropic medications a client might receive.

❖ **Finish** will return the user to the Encounter List screen.

- **Intake**: Using the left menu navigate to the **Intake** screen.



- ✓ If the client is being seen for only an assessment and will <u>not</u> be admitted to treatment, enter the end date of the **Placement Screening** in the **Date Closed** field and then choose the **<u>Save & Close the Case</u>** link. **<u>Save & Close the Case</u>** will change the screen to gray as above. This action closes the client file for editing and enables the user to identify the Placement Screening as a separate case number.

  - ❖ **Finish** will return the user to the Activity List. Note that the user can now tell whether s/he has completed all required elements by looking at the Activity List. A completed Placement Screening (Assessment) data entry for any client should look like the list below with five activities completed.